DIR's Project Management Practice PM Lite

Presented by the

Texas Department of Information Resources (DIR)

Friday, November 15, 2013

10:00 – 11:00 a.m. via Webinar

Presenters

DIR Welcome & Logistics

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Presenter

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Program & Portfolio Management Office
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Use NOTES view to see any additional detail provided by the presenter.

PM Lite

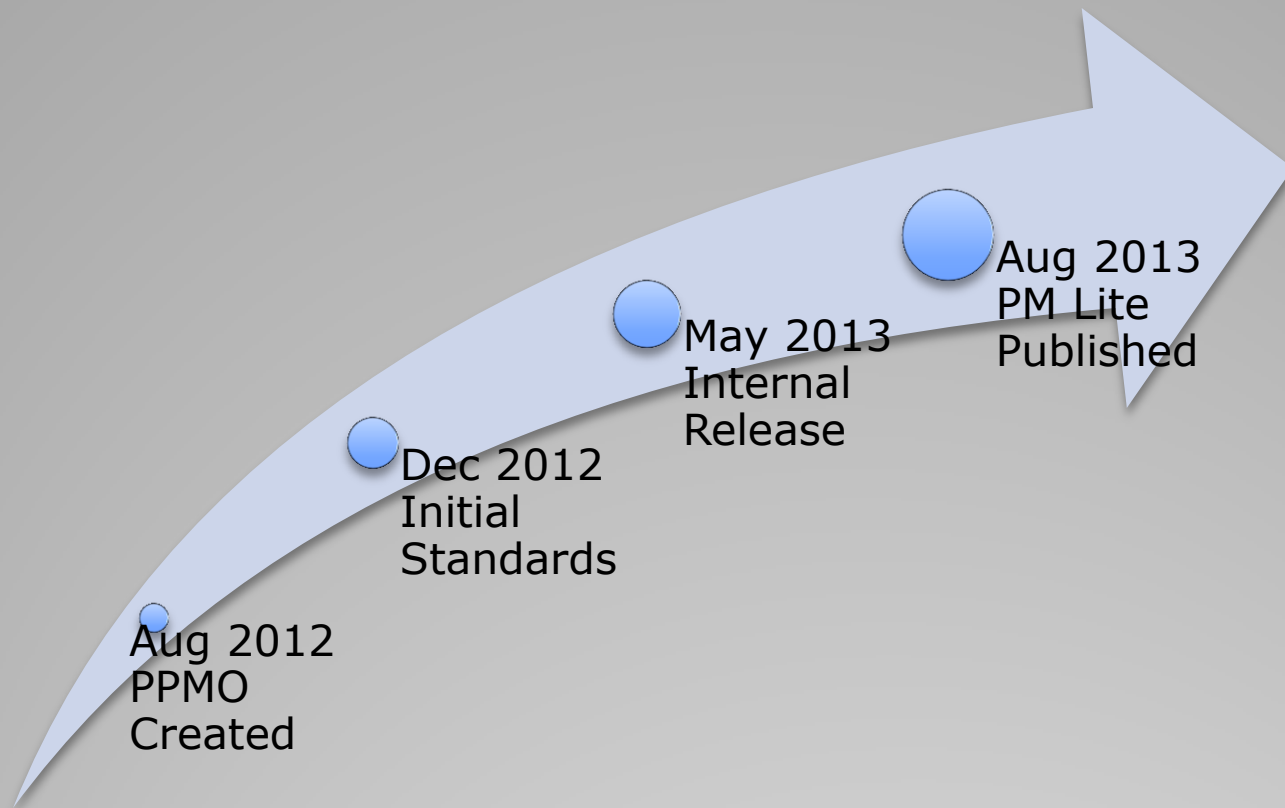DIR's Project Management Practice
November 15, 2013

| Develop tools and best practices for consistent project delivery | → | Options:

Framework

PMI PMBOK

Others |

Overview

PM Lite Timeline

Aug 2012 PPMO Created

Dec 2012 Initial Standards

May 2013 Internal Release

Aug 2013 PM Lite Published

Required templates (5)

Reporting templates (3)

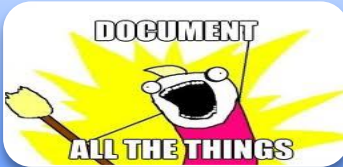Optional / ad hoc templates (3)

Best practices

What?

Compliant with TAC 216

Standards

Consistent project documentation and communications
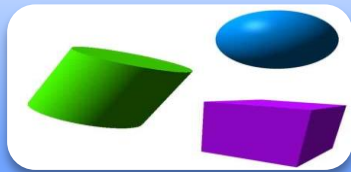
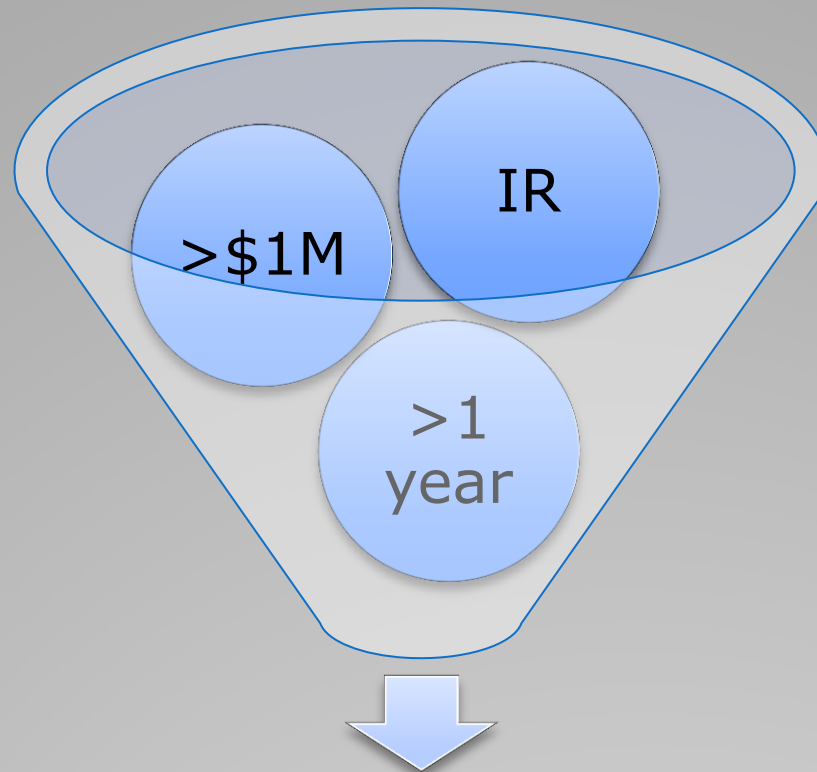Consistent project delivery

Why?

Base structure

Flexibility

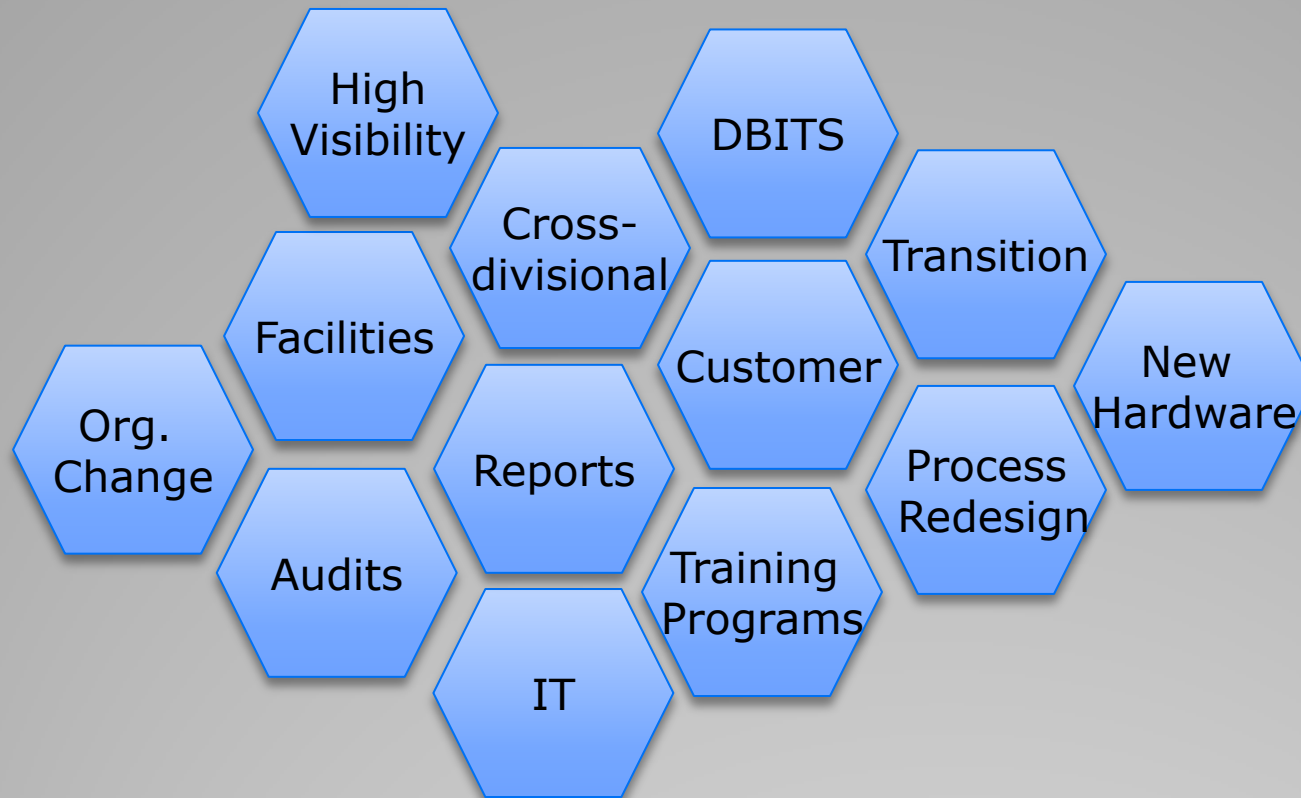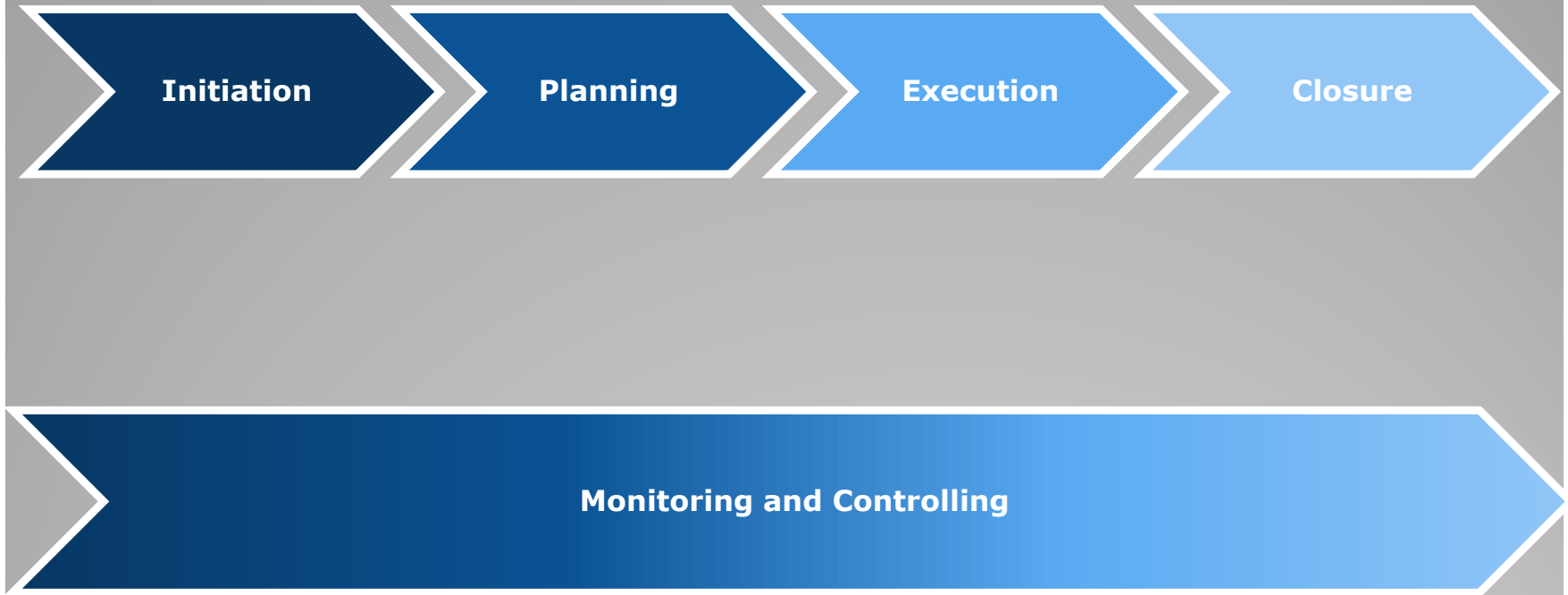Projects of all sizes and types

Auditability

How?

>$1M

IR

>1 year

PM Lite does NOT replace
the Framework for MIRP

Framework

PM Lite Projects

Initiation → Planning → Execution → Closure

Monitoring and Controlling

Project Phases

Initiation	Planning	Execution	Closure

- **Business Case**
- **Project Charter**

- **Business Requirements and Design (BRD)**
- **Milestone Timeline**

- **All project tools**

- **Lessons Learned**
- **Project Closure**

Monitoring and Controlling

- **Project Register**
- **Meeting Notes**
- **Status Reports**
- **KPIs**
- **PCR**

Project Phases and Templates

Recommend a Project

↓

Approve and Initiate

↓

Assign PM

↓

Review Lessons Learned

↓

Identify resources

↓

Kickoff

Required Templates:

Business Case
Project Charter

Initiation

Finalize scope

↓

Develop schedule/budget

↓

Finalize team

↓

Assign tasks

↓

Develop project plan
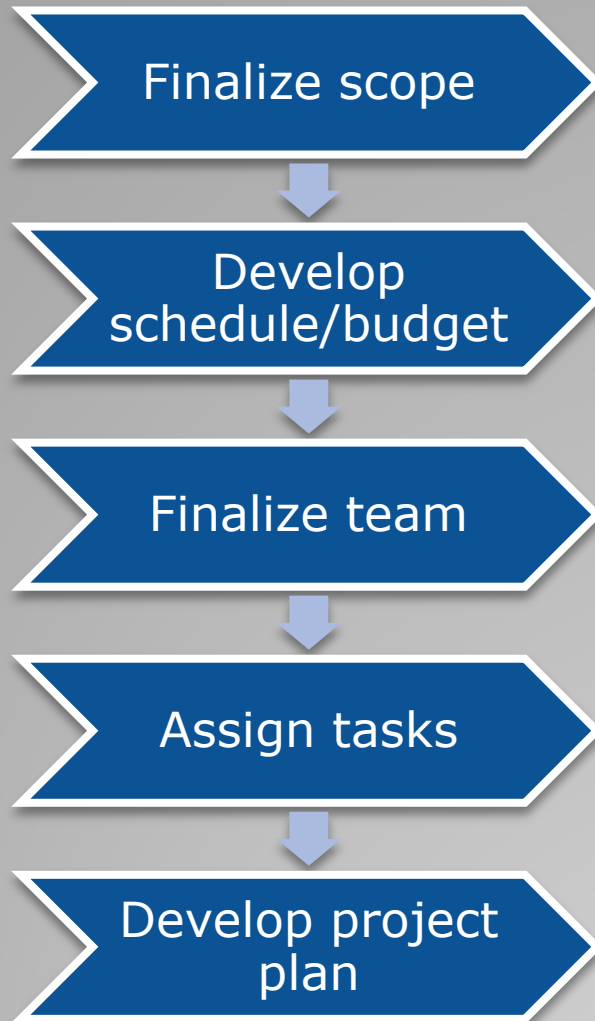
Optional / Ad Hoc Templates:

BRD
Milestone Timeline

Planning

Execute the plan

Communicate

Templates:

All Project tools

Execution

Transition to Operations

↓

Archive artifacts

↓

Document lessons learned

↓

Customer Sat. Survey

↓

Close project
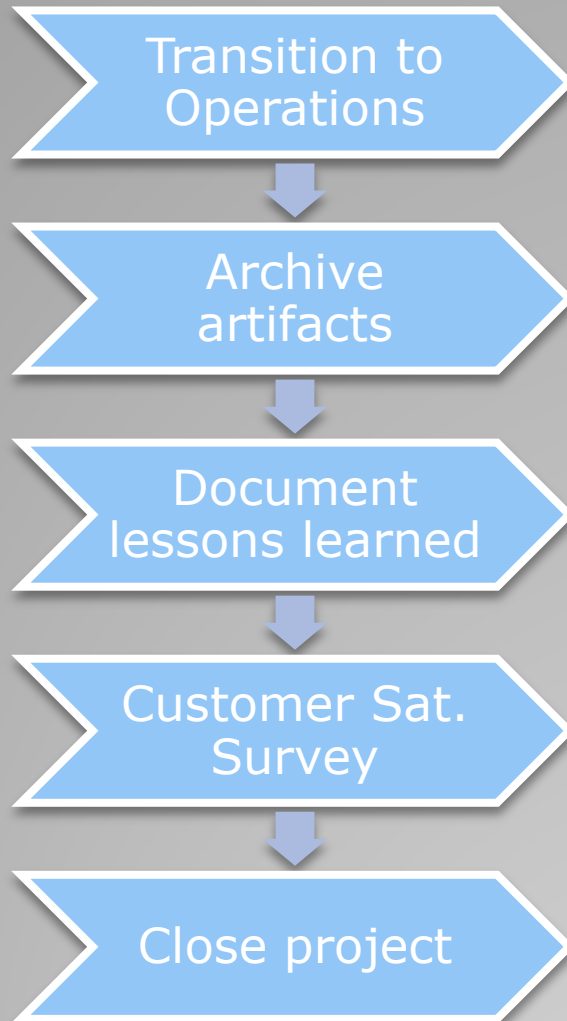
Required Templates:

Lessons Learned
Project Closure

Closure

Track project status

↓

Communicate

↓

Monitor project health

↓

Report to stakeholders

Required Templates:

Project Register

Reporting Templates:

Meeting Notes
Status Reports
KPIs

Ad Hoc Templates:

Project Change Request

Monitoring & Controlling

DIR PPMO PM Lite

Where?

Recommendations

- What works well
- What doesn't and why

Improvements

- Templates
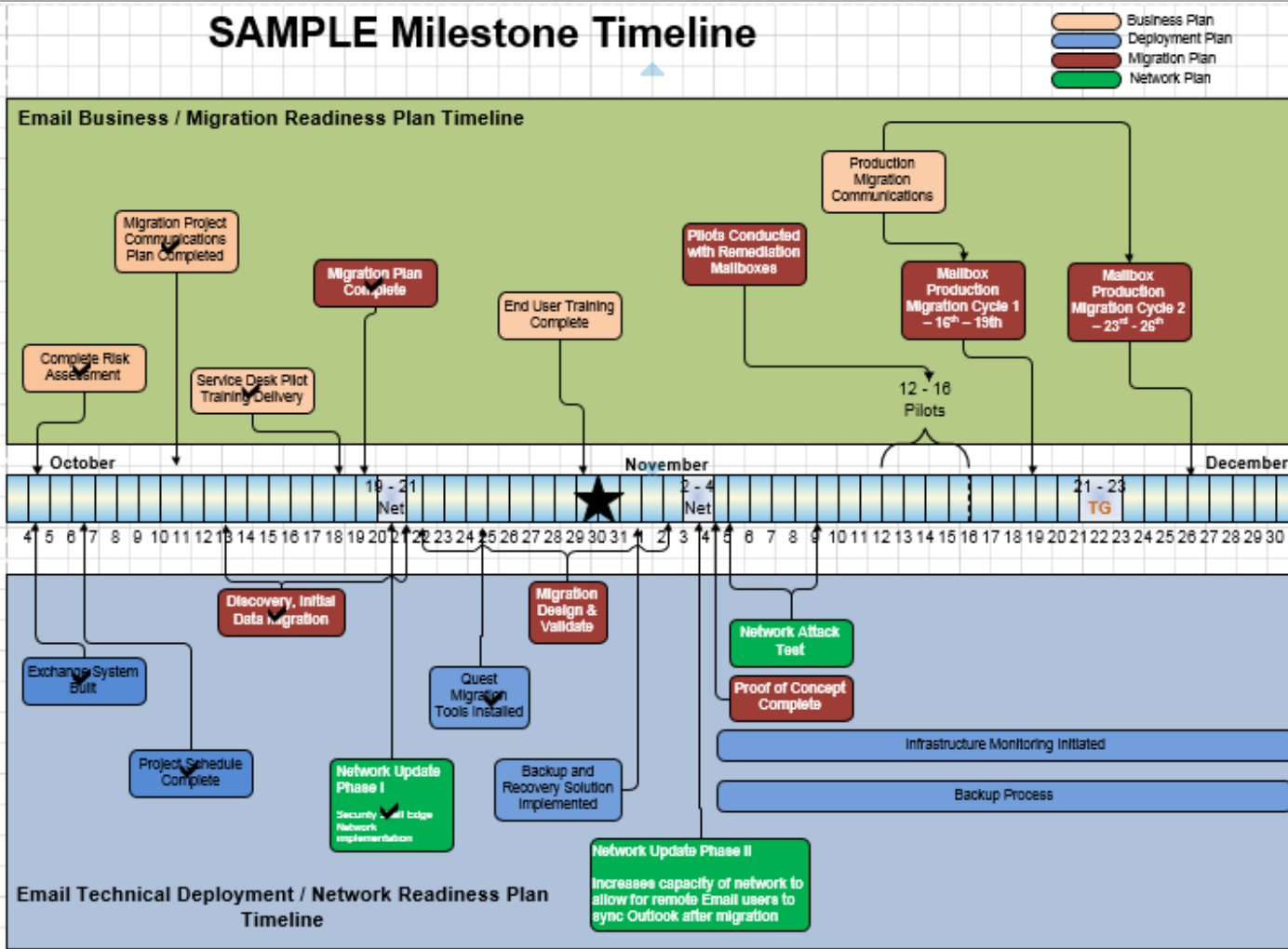- Process
- Criteria

PM Lite Feedback

Questions?

ppmo@dir.texas.gov

Need assistance?

Example: Milestone Timeline

PROJECT TEAM ROLES AND RESPONSIBILITIES

Use this tab to list the project team and key stakeholders.

Contact Name	Title/Organization	Role/Responsibility	Phone	Email

Roles and Resp / Communication Plan / Actions / Changes & Decisions / Deliverables / Schedule / Costs / Risks / Issues / Lessons Learned and Notes / Glossar

eady

Project Register

Status Reports

PPMO Active Projects

Week Ending 6/7/13

Project	STATUS * w Trend	Notes
DIR Connect Expo -- Pre-Planning	Yellow ↓	Spring 2014 event -- developed solution for overall event organization 4/23; high level topics for event agenda scheduled for 6/20.
DCS Office 365	Green -	9 customer projects complete; 5 customer migrations in planning -- 3 w completion dat customers in queue.
June Project Management Workshop for Agencies	Green -	Workshop 6/18 co-hosted by D Project Delivery Framework te numbers: 86 total registrants = staff. The IT Track has 59 regist Track as 27 registrants.
DCS NIPS Monitoring Implementation	Green -	The project team is performing profile tuning concurrently. Thi refine the NIPS profile and red positive alerts prior to Go Live.
Data Normalization	Green -	Identified committee member Committee.

Enterprise COG/COOP
Project Manager – Wendy Mazzurana

Status Report
Week Ending: 11-08-13

Project Status ● Red = Milestone/Key Deliverable missed. Yellow = Milestone/Key Deliverable in jeopardy.
Green = Milestones/Key Deliverables on target. Blue = Complete. Purple = On hold.

Project Start Date	7/10/13	Project Completion Date	TBD	Project Sponsor	Enterprise	Project Type	Strategic

Brief Project Description
► The goal of this project is to produce a comprehensive, DIR enterprise-wide Continuity of Government and Continuity of Operations (COG/COOP) plan that satisfies applicable Texas Administrative Code, Texas Government Code, and Texas Labor Code.

Brief Summary of Current Status and Additional Information
Accomplishments, Project Details, Relevant Information that falls outside of noted categories.
► 10/30/13 – Tabletop exercise held
► 11/7/13 – Midterm Planning Conference and MSEL (Master Scenario Event List) Sync held.
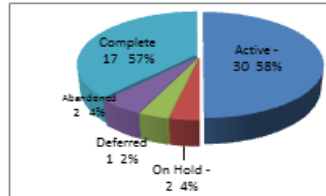
Milestones
Completed milestones shaded in blue.

Description	Original Completion Date	*Revised Completion Date	Actual Completion Date	Approved? (Y/N)
Project Phase Complete: Initiation	8/16/13		8/16/13	
Project Phase Complete: Planning	12/15/13			
Project Phase Complete: Execution				
Project Phase Complete: Closure				
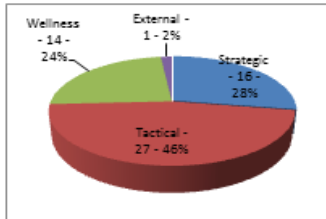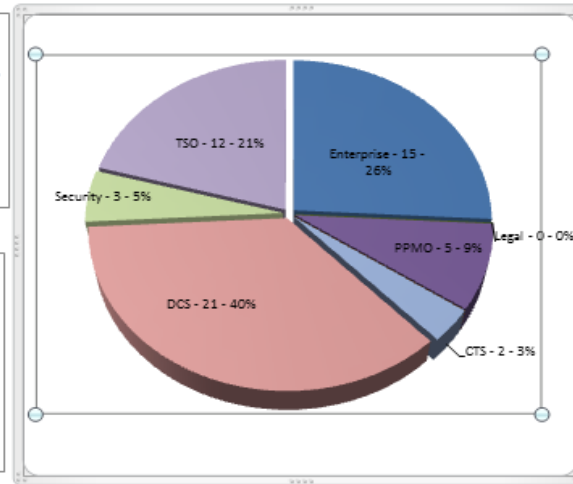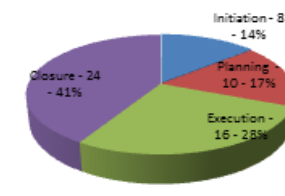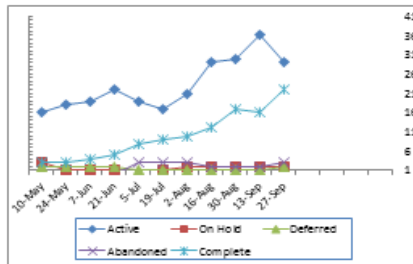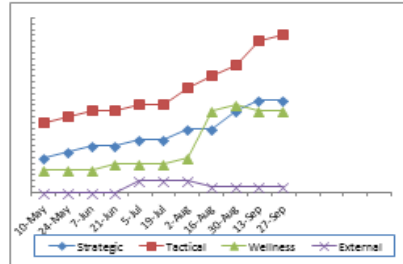
Example - KPIs

Additional Information

This section may contain additional information beyond the core presentation, such as

- ▸ announcements made during the session
- ▸ resources shared by attendees or presenters
- ▸ specific questions/answers that may be of general interest

DIR Events and Discussion Lists

- **Visit the DIR Calendar of Events to view upcoming events and access more details.**

  www.dir.texas.gov **>> see link in bottom right corner**

- **From the Calendar page, click on Collaboration.**

  DIR hosts several discussion lists open to government personnel. Announcements of most upcoming events are emailed to all IRMs and posted on DIRTECH and DIRTRAIN.

  ▸ DIRTECH – any government staff interested in IT issues (600+ members)

  ▸ DIRTRAIN – those involved in coordination/delivery of training (600+ members)

  ▸ TX-PM – those interested in project management

  ▸ App-Dev – those involved in TASSCC SIG or interested in application development

  ▸ ITSOURCING – announcements about DIR cooperative contracts

Upcoming Events

DIR Sponsored/Supported   http://www.dir.texas.gov/about/calendar/Pages/Calendar.aspx

Date	Event
Nov 21	Increase Your Organization's Agility with Service-Oriented Architecture (Webinar)
Dec 04	Texas Project Delivery Framework and Quality Assurance Team Briefing (Full, waitlist only)
Dec 13	TASSCC State of the State
Feb 25-28 Apr 22-25	ELITE 2014 – Nominations being accepted
Mar 26	DIR Information Security Forum

IT Metrics & Productivity Institute (ITMPI) Webinar Library Offer
Any Texas public sector employee may register for a complimentary Premium membership valid October 1, 2013 through March 31, 2014. Subscribe with your work address and enter ITMPI-TEXAS at www.itmpi.org/subscribe

Possible Sources of Sharing and Training

- **Join Tx-PM discussion list (see previous slide for details)**

- **Austin Chapter of PMI -** www.PMIAustin.org

  - Meetings, training - do **not** need to be PMP certified to participate

- **TASSCC Project Management Special Interest Group (SIG)**

  - tasscc.sig.projectmanagement@gmail.com

  - https://sites.google.com/site/tassccsigprojectmanagement/home

- **University of Texas at Dallas hosts the *Project Management Symposium***

  - http://jindal.utdallas.edu/executive-education/executive-degree-programs/project-management/pm-symposium/

  - Relevant to a lot of industries and not just IT

- **PM Exchange at TAMU (IT specific) -** http://pmo.tamu.edu/exchange/

- **Free webinars from ITMPI -** http://www.itmpi.org/